Development of a new on-line Diagnostic Tool: Research Findings
1. About the research:

Ufi learndirect – National Resource Service has identified a need for an on-line skills and interests diagnostic tool\(^1\) for nextstep advisers and clients.

Sally Hughes and Derek Craze of Qudos South East have been commissioned to carry out an in-depth analysis of nextstep providers and advisers needs regarding a new diagnostic tool. They also sought feedback from learnindirect advisers and key policy and decision makers. The findings will be used in the development of a draft product specification.

All 47 nextstep providers were contacted and in total feedback was obtained, through a range of mediums including telephone, email and focus groups from:

32 nextstep providers
81 nextstep advisers
6 learnindirect advisers
4 Policy and decision makers

This report is in three further sections:

Section 2: Research findings

Section 3: Summary of conclusions and recommendations

Section 4: Appendices:
1. Products

2. Research Findings:

In this section, we deal with feedback under six broad sections:

Diagnostic tools currently in use (section 2.1)
Practitioner use of Futures (section 2.2)
Client expectations when using diagnostic tools (2.3)
Barriers to using diagnostic tools (2.4)
Components of a new skills and interest tool (2.5)
Additional views and comments received (2.6)

We have included quotes from respondents, that have been attributed on a regional basis to ensure anonymity, where these are representative of our findings.

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\(^1\) Care should be taken in using the term ‘diagnostic tool’ to avoid confusion about how and why it is being used. Such tools may be used in various ways to assess ability, skills, interests, disposition and attitudes to work and life. In many instances advisers may make only partial use of the capability of a tool with their clients.
2.1 Diagnostic tools currently in use:

Over 60% of respondents told us that Cascaid Adult Directions is their diagnostic tool of choice when working with nextstep clients. It is easy to use, accessible and generally met need.

In addition many advisers told us they use the VT Careers Management Adult Options suite (Pathfinder, Skillscheck and Shortcuts) and Odyssey and Cascaid Careersmatch or Careerscape with their nextstep clients.

A full list of products used with nextstep clients is shown at Appendix 2

A small number of respondents told us about diagnostic tools they had developed themselves although in most cases these are paper-based.

Respondents universally agreed that diagnostic tools should be used to complement advice and guidance activities. Either through an advice session - generally a 20/30 minute intervention, or through ‘enhanced services’ provision of longer or multiple interventions. Clients’ interests were best served when diagnostic tools were used with adviser support to help interpret and understand the process.

The following summarises the responses we received:

“Adult Directions is very effective, well known and embedded” (Provider – West Midlands)

“Most clients like Adult Directions, although some like the more straightforward and plainly presented Pathfinder” (Practitioner – Eastern)

“Adult Options is easy to use…have used several different packages and this one fits in best with the nextstep service as it covers all qualification levels” (Practitioner – East Midlands)

“I would not expect any diagnostic tool to completely replace individual interviews… such tools work better if the client has some help in using and interpreting them” (Practitioner – Eastern)

“Recent research suggests that Adult Directions is popular (though regarded as very limited in many respects) with advisers”. (Policy and Decision Maker)

We asked respondents to tell us about other diagnostic tools they were aware of but that they did not use with nextstep clients and these are listed in Appendix 2. The following comments illustrate typical responses:

“There are hundreds of tools but they are mostly above the Level 2 client” (Provider - Gloucestershire)

“Morrisby is a very effective tool…but we don’t have the funding to deliver it” (Advisers – Hertfordshire)

“…..we don’t tend to use diagnostic tools (with the client group) as they are expensive and time intensive (Practitioner – North Yorkshire)

“We don’t have the funding to carry out psychometric assessments” (Practitioner – East Midlands)

“Computer aided systems generally work well although they are less effective for mediation, referral and confidence building” (Policy and Decision Maker)
Conclusion 1:

Advisers mainly use Cascaid Adult Directions although other tools in the Cascaid range and tools developed by VT Careers Management are popular. Advisers like to use tools that are familiar to them.

Our research suggests that no diagnostic tool can be used by clients in an entirely free standing and unaided/unsupported way.

An adviser generally needs to be accessible to guide completion if needed and essentially interpret the results. Adviser support should be signposted at various points to support clients who may change their mind part way through or get stuck or lose interest or motivation.

The selection of a diagnostic tool to use with nextstep clients is governed by the time a practitioner can spend with a client, which may only be 30 minutes unless the client is accessing ‘enhanced services’.

2.2 Practitioner use of Futures:

We asked nextstep advisers:

Do you use the learndirect Futures diagnostic tool?

Almost 75% of advisers surveyed did not use Futures and, surprisingly, 25% were not aware that it existed. Typical responses are summarised below:

“Have not seen it, used it or had it recommended to me” (Practitioner – East Midlands)

“We use Careersmatch…it means the client doesn’t have to go through a registration process” (Practitioner – Eastern)

“Access can be an issue when working in an outreach situation” (Practitioner – East Midlands)

“I have used Futures but time constraints have prevented me from using it or even promoting it to our service providers” (Provider – London)

“Not aware of it until recently…internet access is not always available…unlikely that clients with lower level qualifications would undertake the full range of exercises without supervision” (Practitioner - South East)

“I was not able to quickly find my way around the website…it would be a barrier to me to have to use an online tool unless it offered something more than the tools I already use” (Practitioner - Eastern)

This research has found that there are several aspects of Futures that may inhibit access, these include:

⇒ ‘Pop up’ screen blocking (a feature of Windows XP) may deny access for some users and the action to disable this may deter some advisers (and consequently clients) from going further

⇒ Registration requirements can slow down access. Many popular names have already been used and this appears to deter some users
⇒ Some aspects of the card sorting and rating scales are not fully understood by all target group clients

One provider who participated in the Futures trials told us that although the multi-media format was well liked at first glance, it proved to demand a level of IT skill that many older and less able clients simply did not have, was rather weak on lower level occupations and, did not seem as robust and researched on the career match element. Overall it was considered better on presentation than content and subsequently fell into disuse.

learndirect advisers told us they refer clients with access to the internet to Futures particularly to develop career ideas. Advisers explain to clients how Futures uses virtual card sorting devices for ‘my skills’ and ‘my work’ and a five point agree-disagree rating scale for ‘my interests’. Clients then access Futures in their own time but can call their adviser if they have problems with navigation or if they wish to discuss the findings.

The learndirect advisers provided limited feedback with regard to usage but commented that:
- Assessing a client’s degree of understanding over the telephone can be difficult
- Generally older clients needed more support
- The ‘skills’ activity was not always understood by clients
- The ‘world of work’ can prove difficult for clients to interpret.

“Many feel that Ufi material presupposes a more proactive client and one more readily able to use ICT. For disengaged clients old style, and seemingly simpler paper based, approaches often may be better. It is a mistake to rely on one format. For most adult clients a battery of tools is needed to allow an adviser to choose one that seems to best meets client needs.” (Policy and Decision Maker)

**Conclusion 2:**

*Futures* is capable of all that is required of a diagnostic tool but is perceived as too complicated by some clients and advisers and lacks relevance to the target group of below level 2 clients.

Usage may be low because of perceived complications but our research suggests that a more likely reason could be the established market position of other well known products.

Advisers tend to use products familiar to them and are reluctant to use tools other than those considered ‘tried and tested’. This position is reinforced when awareness, for whatever reason, is low and when registration and accessibility is perceived by some to be difficult.

There may be a case for introducing a programme of support to encourage advisers to use Futures with clients where appropriate.

### 2.3 Client expectations when using diagnostic tools:

The general view from respondents was that most nextstep clients would not be aware of diagnostic tools or how they might be used. Most believe that clients see using a diagnostic tool as aiding the one to one discussion by providing direction or ideas of jobs or, as a tool to help them analyse their strengths and weaknesses.

We received a very clear message from advisers that diagnostic tools need to be used in conjunction with an interview as clients would not be able to decide which tool would best suit their needs, or necessarily how to interpret the results. There was also a body of evidence that supported the view
that there would be value in a resource that could be used by clients in an unmediated situation either prior to or following a one to one interview.

The following summarises the responses received:

“The client wants an answer and solution but use of a diagnostic tool is just part of the process” (Provider - Eastern)

“Don’t think they (clients) know what they are” (Provider – West Midlands)

“People want help in a confused way – they are up for anything that might help and nextstep clients are no different” (Provider – North East)

“How to find the right or better job” (Practitioner – Yorkshire and Humberside)

“...an aid to broadening out job ideas or as a starting point of there seems to be no ideas” (Practitioner – East Midlands)

“Many clients just want someone or something to come up with the perfect job that matches all their needs without too much self analysis” (Practitioner – South East)

### Conclusion 3:

Advisers told us that clients value assessment tools that help confirm skills, interests and aptitudes.

Some clients like to use online tools or other software or paper tools on their own. It would be valuable to have tools that can be used unaided.

### 2.4 Barriers to using diagnostic tools:

Respondents were clear that the main barriers to using computer based diagnostic tools with nextstep clients fell into the following three categories:

**Technical factors:**
- On-line tools can be hard to access especially when working in an outreach situation
- Some tools with graphics require fast IT systems – which not everyone has
- Tendency for some on-line tools to be unstable and slow
- Pop up screen enabling allowable on networked installations

**Content of the tools:**
- Language levels inappropriate
- Job titles can be outdated or not easy to understand

**Personal factors:**
- Lack of client IT skills
- Some clients (and we believe some advisers) have a preference for paper based tools
- Tools are too time consuming to use within the time available for working with clients
Respondent feedback can be summarised as follows:

“…most of our clients are older and not used to computers – the use of computers with below Level 2 can be a real barrier” (Provider – West Midlands)

“Diagnostic tools are most effective when supported by a one to one interview, but this can be costly within the time available to see clients…an advice intervention is approximately 20 minutes” (Provider – Yorkshire and Humberside)

“All the tools currently in use have issues with language” (Provider – South West)

“Quite often the job suggestions are outdated and unrealistic or obscure” (Provider – North East)

“Any new tool could only be used with a small number of ‘enhanced service’ clients…even if made available to clients to use before a one to one many, especially the below Level 2 with ESOL and basic skills needs, would need help” (Provider – West Midlands)

“Questions about client skills can confuse things. Many women underestimate their skills and many men overestimate theirs…..it is safer to discuss this later when a job list based on interests has been identified. Clients rarely express a keen interest in an area where they have no aptitude at all. A lack of skill can be confused with lack of knowledge about an occupation which can distort the picture and exclude many possible jobs in a client’s mind”. (Practitioner – South East)

### Conclusion 4:

Respondents told us that some clients find using ICT equipment daunting and may find the language or navigation challenging.

Some advisers find due to technical reasons that access and usage is difficult or time consuming or both.

Perceptions vary about the value of the tool in terms of identifying relevant occupational areas or job ideas.

### 2.5 Components of a new skills and interest tool:

In many instances respondents were unable to tell us what they would want to see included within a new skills and interests tool. The view that came across was that a mix of Adult Directions with some aspects of Odyssey and Pathfinder plus a bit of Morrisby would provide the perfect tool. A small number of respondents wanted a tool that would provide them with an immediate indication of the clients’ level, i.e. below or above Level 2.

The following ‘wish list’ reflects the views of respondents who were able to offer suggestions:

**Client skills to include:**
- Basic skills assessments that link to skill levels required for work
- Information on the actual skills levels needed for specific jobs
- Matching against NVQ levels to provide a benchmark of skills levels required
- Assessment of manual and visual dexterity
- Assessment of problem solving skills and recognition of items used by clients in work
- Include assessment tests set by the Skills Sector Councils (though limited in terms of availability)
- Assessment of skills that help develop a CV
Client interests to include:
- Something that captures home based skills, voluntary/charity work, sports, hobbies, group involvement and how they contribute to work skills
- Something that can help confidence and motivation – needs to be something with sensitivity that covers the ‘how you feel’ element (both Windmills and Rickter touch on this)
- Links to localised courses, FE and learndirect provision
- Links to Local Labour Market Information
- Mapping across to current job vacancies
- An attitude test on work environment, i.e. working outdoors, working alone, working from home, working with others, etc.
- An attitude test on working for yourself, becoming self-employed
- Needs of clients in terms of part-time hours, flexible hours and need for school holidays

Other areas to be included:
- Precluded jobs due to background or health highlighted
- Job descriptions need to be up to date and relevant to today’s workplace
- Learning Styles
- Pay levels by region

Reports:
- Clear easily understandable and readable reports for clients to take away
- Good use of colour and graphics
- Text written in an unambiguous and non-patronising manner
- Strength of interest or preference rating scales would be useful and provide more scope for discussion

Application: The majority of respondents wanted a tool that could be used flexibly in either a freestanding situation, network based or on an on-line basis. Concern was expressed with regard to the development of a purely on-line tool due to access and stability – especially for advisers working in outreach settings. It was suggested that if the new tool is internet linked that free wireless cards should be provided although variable signal strength can mean links are unreliable.

Format: Respondents accepted that any new tool would be ICT based, however, two thirds of respondents told us they would also like access to a paper based version especially for group work situations.

Respondents told us:
“What is really required is a tool that helps the adviser determine if the client is actually at Level 2…lots are above but they just don’t have the qualifications…need something to help the client place themselves in terms of qualifications levels and what they can actually do” (Provider – Essex)

“…a tool with plenty of easily read material and links to other sites and information should give people information and facts for them to choose… too often the tools come up with unrealistic career options and fail to take Local Labour Market Information into account” (Practitioner – South West)

“Clients can have unrealistic expectations and when a diagnostic tool is based on values, likes and dislikes, the ideas that come through can confirm these, whereas an adviser would focus on likes and dislikes along with astute questioning techniques to ascertain information such as learning needs, health issues, quality of previous experience, personal qualities, part-time interests, and match these to the opportunities being considered.” (Practitioner – West Midlands)
**Conclusion 5:**

Including all the components highlighted by respondents into one tool will require the development of a highly sophisticated piece of software requiring regular upgrades.

For any tool to be ‘fit for purpose’ in a climate where advisers are under pressure to meet targets, it will need to be quick to access and easy to use.

Any tool is inevitably going to represent a compromise and links through a series of platforms, to areas that assess particular aspects of ability, skills, interests and disposition is probably the way forward.

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**2.6 Additional views and comments received:**

We received a sufficient level of the feedback that questioned the need for the development of a new on-line tool specifically to meet the needs of nextstep advisers. The following quotes are representative of this feedback:

“Just have to question why a new tool is being considered – there are so many good tools on the market already…a lot has already been invested in Futures and it isn’t used by advisers” (Provider - East Midlands)

Try to build on what exists already rather than re-invent the wheel (Practitioner – South East)

“Using a diagnostic tool (with a client) is a small part of the process – do we need another tool?” (Practitioner Focus Group – Eastern)

Whilst it is essential to re-examine tools and approaches in order to improve services, I see no value in re-inventing the wheel. Rather than invest time devising a new programme – it may be preferable to continue to improve and upgrade Adult Directions” (Practitioner – London)

“I’m concerned about the cost of developing a new tool when in reality it may only be used by a small number of enhanced services clients” (Provider – South West)

The imminent launch of the Skills Coaching pilot and the expansion of the Employer Training Programme will increase the volume of below Level 2 clients accessing services. As these programmes will be managed by the same organisations delivering nextstep it would demonstrate some ‘joined up thinking’ to those working in the field if the proposed skills and interests diagnostic tool has the capacity to include the needs of advisers working on these other programmes.

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**Conclusion 6:**

Many providers and advisers feel that there are sufficient products available already. The further enhancement of existing products may be the acceptable way forward.

The needs of many clients can be met by skilled and well informed adviser intervention without recourse to any diagnostic tools.

The new diagnostic tool should have the capacity for further enhancement to meet the needs of advisers working on the Skills Coaching pilot and the Employer Training programme.
3. Summary of Conclusions & Recommendations

We have summarised our conclusions about provider and adviser feedback under each key point from the previous section together with our initial recommendations.

**Conclusion 1:** (section 2.1)
- Most advisers use tried and tested tools produced by companies well established in the market place
- No diagnostic tool can be used by clients in an entirely free standing and unsupported way
- Advisers need to be accessible to guide completion and interpret the results. Adviser support should be signposted at various points for clients who get stuck or lose interest or motivation
- Selection of diagnostic tools for nextstep clients is governed by the time a practitioner can spend with a client

Recommendation:
⇒ Use diagnostic tools selectively and with care

**Conclusion 2:** (section 2.2)
- Futures is perceived as too complicated and lacking relevance to below level 2 clients
- Usage is low
- Advisers tend to use products familiar to them and are reluctant to use something new

Recommendation:
⇒ Encourage advisers to use Futures before deciding if enhancement or replacement is required
⇒ Simplify access

**Conclusion 3:** (section 2.3)
- Clients' value assessment tools that help confirm skills, interests and aptitudes
- Some clients like to use online tools or other software or paper tools unaided

Recommendation:
⇒ Devise tools that can be used unaided

**Conclusion 4:** (section 2.4)
- Some clients are reluctant to use ICT equipment
- Some advisers find access and usage difficult or time consuming or both
- Perceptions vary about the value of the tool in terms of identifying relevant occupational areas or job ideas

Recommendation:
⇒ Develop and implement a strategy to overcome technical and individual barriers to accessing ICT

**Conclusion 5:** (section 2.5)
- To include all the components identified into a new tool will result in a highly sophisticated piece of software
- To be ‘fit for purpose’ the new tool will need to be quick to access and easy to use
- Any tool is inevitably going to represent a compromise and links, through a series of platforms, to areas that assess particular aspects of ability, skills, interests, disposition is probably the way forward

Recommendation:
⇒ Make full and appropriate use of existing tools and build electronic links between them

**Conclusion 6:** (section 2.6)
- Many providers and advisers believe that there are sufficient products available already
- Needs of many clients can be met by skilled and well informed advisers without diagnostic tools
- Providers are managing a range of programmes where the focus is on the below Level 2 client

Recommendation:
⇒ Enhance and further develop existing products
⇒ Take into account adviser needs across the range of programmes they deliver to ensure synergy
Section 4 Appendices

Popular products used with nextstep clients

CASCAiD  www.cascaid.co.uk
- Adult Directions is a careers program which helps adults with their careers decisions. It is based on an individual's work interests and produces a list of personalised career suggestions
- CareersMatch provides users with a personalised list of careers suggestions and information on over 1800 career titles
- CareerScape occupational database enables users to link their skills and interests with jobs.

VT Career Progressions  www.progressions.co.uk
- Pathfinder a psychometric assessment of interests matched to a jobs database
- Odyssey.2 an occupational information database containing almost 800 titles
- SkillCheck helps users identify their work related skills and matches the resulting profile to jobs
- Jobfile an occupational database
- Adult Options a combined package of Pathfinder SkillCheck and Shortcuts (a searchable version of Jobfile)

Other products being used with nextstep clients

AQR (division of TCA Consultants Ltd)  www.careermapper.co.uk
- Career Mapper a software based system used to create an employability profile and a structured approach to examining and making decisions about career options

Basic and KeySKILLBUILDER  www.bksb.co.uk
- provides a range of interactive and paper based resources for literacy and numeracy assessment and a learning styles assessment

Basic Skills Unit  www.basic-skills.co.uk
- Initial assessment a paper based resource for assessing literacy or numeracy levels and providing a clear indication of basic skills need from Entry level to Level 1
- Fast Track a simple paper based screening tool to identify literacy skills below level 1 and numeracy skills below Entry 3 of the national standards

Cambridge Training and Development  www.ctad.co.uk
- Basic Skills Screener a software based system of assessments in literacy (reading and writing) and numeracy set at levels 1 and 2 of the national standards

FunderFinder  www.funderfinder.org.uk
- provides details of directories an web based resources dealing with sources of money for individuals in need and with educational grants

learndirect futures  www.learndirect-futures.co.uk
- matches clients skills and interests to opportunities in the work place

Morrisby profiling  www.morrisby.com
- a series of tests or assessments which helps users to identify a career that matches their abilities and their work interests

Myers Briggs  www opp.co.uk
- assesses personality and work preference types

Rickter Scale  www.rickterscale.com
- assesses aptitude and work based personality

Skills for Life  www.dfes.gov.uk/readwriteplus
- on-line practice versions of national tests for literacy and numeracy

Stamford test  www.ucas.ac.uk/stamford/
- matches subject areas and higher education courses to personal interests, abilities and skills
Products in use but not with nextstep clients

Career Health Checker
Career Storm
Careers Information Database
Cattels 16pf
FiroB
Futureselves
Genesis suite of psychometric tests
GOALS
Gradscope
My Potential
NARIC
Promicad
The Real Times suite
Windmills